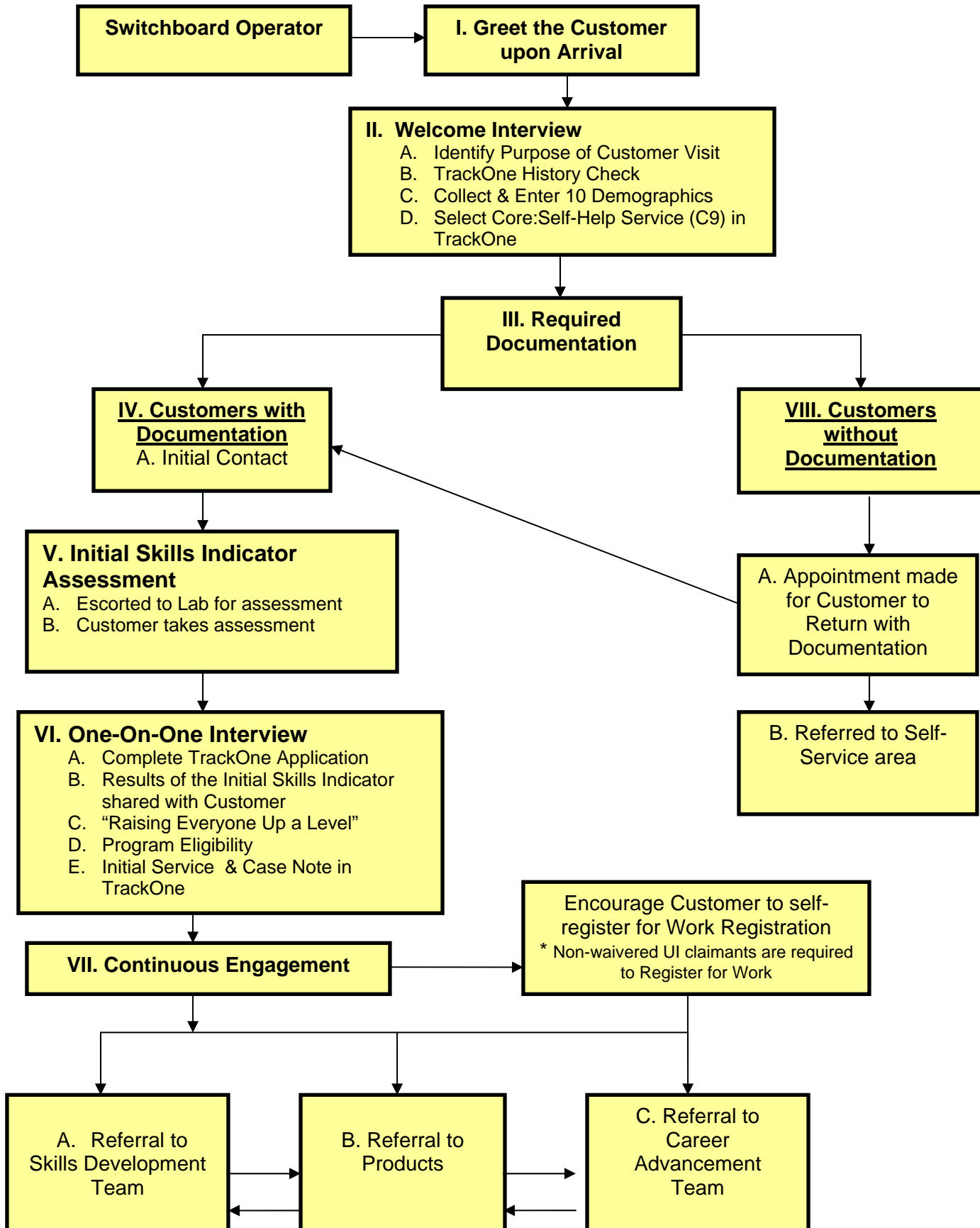


TALENT ASSESSMENT TEAM PROCEDURES

Talent Assessment Team Mission

The mission of the West Central WorkOne Talent Assessment Team is to greet all customers promptly, listen and gather information, initially assess skills and needs, and to direct customers to appropriate services and opportunities that capture their interests, while being relevant to employers; during the process, fostering the spirit of integration and maintaining the integrity of the data.

Talent Assessment Team Process Customer Flow



Talent Assessment Team: Member

Functional Responsibilities

- Greet customers in a prompt, friendly, welcoming, and professional manner
- Determine the purpose of each customer's visit and direct them accordingly
- Assist customers through each step of the Talent Assessment Team process
- Answer questions about the WorkOne Center's services and resources, as well as other community resources when necessary
- Enter 10 demographics in TrackOne for each customer, opening their electronic TrackOne file
- Evaluate the service needs and barriers to employment of WorkOne customers
- Set up and facilitate Initial Skills Indicator Assessment activities and analyze indicator results
- Conduct a one-on-one interview to assess the skill levels, aptitudes and abilities of WorkOne customers and concurrently enter required application information into the TrackOne system
- Based on indicator information, refer customers as appropriate to the Skills Development Team, Product Team, or Career Advancement Team
- Record indicator and other services provided in TrackOne, including entry of case notes to document customer interactions
- Schedule appointments for customers as needed
- Data entry
- Support other teams as needed

Talent Assessment Team: Switchboard Operator

Functional Responsibilities

- Answer all incoming calls, routing calls promptly and correctly to proper WorkOne staff
- Take and relay urgent messages to WorkOne staff when necessary
- Support other teams as needed

Talent Assessment Team Procedure – Overview of Customer Flow

I. GREET AND ENGAGE THE CUSTOMER

- Approach the customer when they enter WorkOne
- Let the customer know you are there to help and guide them through their experience at WorkOne
- Provide prompt service
- Seek and tap into what motivates the customer for coming into WorkOne

II. WELCOME INTERVIEW

- **Do TrackOne History Check**
- Further identify purpose of customer visit
- Complete initial data entry by collecting and entering the 10 demographics in TrackOne (if not already done).
- Select Core:Self-Help Service (C9) in TrackOne

III. REQUIRED DOCUMENTATION

- Determine if customer has required documentation

IV. CUSTOMERS WITH DOCUMENTATION

- Inform customer about the activities they will be engaged in and allow for the Talent Assessment Team to immediately respond to the needs of customer

V. INITIAL SKILLS INDICATOR ASSESSMENT

- Immediately engage customer through first service step
- Administer initial assessment in a conducive computer lab environment
- Team Member available for technical assistance

VI. ONE-ON-ONE INTERVIEW

- Complete TrackOne application
- Interpret and communicate results of the initial skills indicator assessment
- Promote and explain “raising everyone up a level”
- Review program eligibility as determined by TrackOne System
- Give options and advice to customer
- Record Initial service and case note in TrackOne, which triggers first Staff-Assisted Intensive Service (choose 1-on-1 Career Counseling in TrackOne)

VII. CONTINUOUS ENGAGEMENT

- Determine best WorkOne Service path for customer.
- Assign customer to Skills Development Team or Career Advancement Team
- Choices include: referral to Skills Development Team or Career Advancement Team. May refer directly to WorkOne Product Activities if Career and Skill Team Members not available or customer is out of time
- Schedule appropriate activities in scheduling system (if necessary)
- Encourage Customer to self-register for Work Registration (non-waivered Unemployment Insurance claimants are required to Register for Work)

VIII. CUSTOMERS WITHOUT DOCUMENTATION

- Appointment is made for customer to return with documentation
- Customer is shown the self-service products

Talent Assessment Team Procedure – Customer Flow

Overview

All customers will be offered the opportunity (and encouraged) to participate in WorkOne services that will lead to skills enhancement and employment. In the Talent Assessment Team Process, a customer completes all enrollment activities which will enable them to access the full range of services being offered in the center. Assuming customer has all necessary documentation, the customer will complete their initial skills indicator assessment, and meet with a Talent Assessment Team Member(s) one-on-one, that will conclude with referral strategies to immediately engage the customer in WorkOne services.

I. Greet the Customer upon Arrival

Once the customer walks in, the customer will be greeted in a prompt, friendly manner by a Talent Assessment Team Member. At this point the customer will be asked “How may we help you today” to immediately engage the customer in WorkOne services?

II. Welcome Interview

A. Identify Purpose of Customer Visit: The Talent Assessment Team Member will make all effort to engage the customer by guiding them through the Talent Assessment Team process. The scheduling system may be referred to for returning customers as well. Likely scenarios for customer's visit include:

- Job Search assistance
- Register for Work
- Coming in for an appointment to register with the Talent Assessment Team
- Coming in for an appointment to see a member of the Career Advancement or Skills Development Team
- Coming in to attend a workshop or group activity
- Unemployment Information, filing or resolving an issue*
- Coming in for REA or TAA services and assistance*
- Coming for other appointments such as UI hearing, UI auditors etc.*

* The Talent Assessment team will direct customers to their appropriate destination regarding these programs; however, every effort should be made to engage customer through the Talent Assessment Team process.

B. TrackOne History Check (See “A” in Addendum 1A):

1. Determine if customer has been entered in TrackOne, if **not**, proceed to next step (C).
2. If customer is already entered in TrackOne but only has 10 demographics, proceed to III.
3. If customer's application is complete in TrackOne, refer to Skills Development or Career Advancement Teams.

C. Collect & Enter 10 Demographics in TrackOne (See “B” in Addendum 1A):

1. Ten (10) demographics are collected and entered in TrackOne.
2. The 10 Demographics to enter are:
 - First name
 - Last name
 - Social Security number (SSN)
 - Veteran status
 - Employment Status
 - Date of Birth (DOB)
 - Gender

- Race
- Ethnicity
- Disability status

- D. The Talent Assessment Team Member records a service (C9) in TrackOne.
- a. No case note will be entered in TrackOne at this point.
 - b. Refer to **“C” in Addendum 1A** for step by step instructions on how to report the Core Service (C9) transaction in the TrackOne system.

III. Determine if Customer has Required Documentation

- A. The Talent Assessment Team Member asks the customer if they have the required documentation (**see Addendum 1A**) to begin the Talent Assessment Team process.
1. If Customer says they have documentation with them, proceed to IV.
 2. If Customer does not have documentation. Proceed to VIII.

IV. Customers with Documentation

A. Initial Contact

1. The customer is informed of the activities you will engage them in as well as the Talent Team Assessment process in a friendly and professional manner.
 - a. “During this appointment we will take a quick look at your skills and complete a short interview process.”
 - b. “Everything that we learn will be used to help us serve you better.”

V. Initial Skills Indicator

- A. The customer is escorted to the Initial Skills Indicator Assessment lab by the/a Team Member.
1. There will be a Talent Assessment Team Member devoted to assisting customers with the Initial Skills Indicator Assessment in this computer lab.
 2. This staff person will set up the Initial Skills Indicator Assessment and provide quick instructions to the customer on how to complete the assessment. The customer will be instructed to notify the Team Member when assessment is completed.
- B. Customer takes Initial Skills Indicator Assessment and notifies the Team Member when assessment is complete.
1. The Team Member will then escort the customer to a location where the interview and TrackOne application will be completed by another (or the same) Talent Assessment Team Member.

VI. One-on-One Interview

A. Complete TrackOne Application:

1. The Talent Assessment Team Member will conduct a one-on-one interview with the customer and concurrently enter required additional application information (including *Work History*) in TrackOne. **Refer to “D & E” in Addendum 1A.**
2. The Team Member will review the eligibility documentation of the customer and record documentation in TrackOne.
3. If the customer is between the ages of 18 and 26, and male, the Talent Team Member will verify Selective Service Registration online via **TrackOne (See “F” in Addendum 1A).**
 - a. If customer is registered, record in TrackOne
 - b. If customer is not registered, register customer during this process via website.
 - c. Enter customer’s selective service registration number in TrackOne.

4. The customer will sign the application electronically.

B. Results of the Initial Skills Indicator Assessment shared with Customer

1. After reviewing the initial assessment data collected from the Initial Skills Indicator, the results will be entered in TrackOne as “Informational/Self-Service” under “Service Notes.” **See “G” in Addendum 1A**
2. Results will then be shared with the customer
3. *Sample narrative to be discussed with the customer:*
 - a. “Your Initial Skills Indicator Assessment indicates your level in reading for information.” At this time, WorkOne services should be promoted that relate to the customers assessment results. “Do you have any questions for me?”

C. “Raising everyone up a Level”

1. Specific questions may be asked of the customer, as appropriate, in order to gain a better understanding of the customer’s skill levels and goals and to assist in making the appropriate referral to the Career Advancement Team, Skills Development Team or Products.
2. Questions should focus on the following seven issues that will help make a quality referral to these Teams. These questions will be asked in an order that coincides with the information as it is entered into the TrackOne system. These seven issues include:
 - What brought the customer in the office? What is their perceived need for employment and skills development services?
 - What job goal does the customer have?
 - What is the customer’s work history?
 - What are the customer’s barriers to skill development or employment activities?
 - What is the customer’s educational history (current diplomas and certifications as well as those certifications that may be needed)?
 - What are the customer’s financial obligations and needs?
 - Has the customer participated in a TAA orientation and/or been issued a marketable skills waiver?
3. The Talent Assessment Team Member will refer the customer to the Career Advancement Team or the Skills Development Team. In addition to the information gathered during the one-on-one interview, this decision should be based on the Team Members’ evaluation of the following factors:
 - The customer’s need for additional certifications to acquire employment
 - The customer’s need to acquire additional skills to secure employment
 - The customer’s financial needs and circumstances
 - The customer’s assessed need based on their work history, educational background, Initial Skills Indicator Assessment scores, and identified barriers to employment
 - Whether the customer has been issued a TAA waiver for marketable skills or for future training activities
 - Unemployment Insurance issues, needs, and questions
 - REA issues, needs, and questions*

D. Program Eligibility:

1. At the completion of the TrackOne application activity, the TrackOne system will indicate to the Team Member which programs the customer may be eligible for.
2. The Team Member will **enroll** all customers in the WIA Adult and Wagner Peyser adult funding stream. **See “H” in Addendum 1A**
3. The Team Member will attach the customer to the Skills Development or the Career Advancement Team. *TrackOne capability pending.

E. Initial Service & Case Notes in TrackOne

1. Once the application is complete, the Talent Assessment Team Member will report an initial service and enter an enrollment case note in TrackOne. **See “I” in Addendum 1A.**
2. The WIA Adult and Wagner Peyser **funding** streams will be selected to officially enroll the customer in both programs.
3. *The service to be selected is “one on one career counseling.” *WP Service type list pending.*
4. In TrackOne, the Team Member will enter an enrollment case note for the customer. **See “J” in Addendum 1A.**
 - a. This initial case note establishes the need for “significant staff involvement” and must have the following components:
 - i. Describe the assessment service that was provided to the customer; and
 - ii. Indicate whether the customer is being referred to the Skills Development Team or Career Advancement Team for further services and why.
 - iii. If no Team member is available, customer may be engaged in Product Activities
 - b. **This service activity triggers enrollment for performance.**

VII. Continuous Engagement

- A. Once a decision is reached on which team the customer is to be referred to, the Talent Assessment Team Member will use one of the following strategies to **continuously engage** the customer in WorkOne activities. All customers will be encouraged to self-register in the state job matching system. Non-waivered UI claimants will be reminded that they are required to register for work.
 1. If Career Advancement or Skills Development Team Member is available, the Talent Assessment Team Member will walk the customer back and introduce the customer to the appropriate Team Member.
 2. If a Career Advancement or Skills Development Team Member is not available (or if the customer is out of time), the Team Member will schedule the customer with the appropriate Team.
 3. Schedule or immediately engage customer for a Product Activity (if available). If necessary, give customer an appointment card.

VIII. Customers without Documentation

The customer will be encouraged to make an appointment to receive one-on-one service if:

- Customer does not have the required documentation
- Customer is limited on time
- Customer has children with them (no children are allowed in the Initial Skills Indicator Computer Lab)

- If there is any other reason that would prevent the customer from further completing any step of the Talent Assessment Team process on the day of their visit.
- .
- A. The customer will receive an appointment/information card to return with the specified required documentation
 - B. The Customer may be referred to the self-service area.

Talent Assessment Team Procedure – Switchboard Process

The main function of this position is to route customer calls to the appropriate destination within the WorkOne center. This is done in a professional and friendly manner at all times, regardless of any circumstances. There must be someone in this function at all times during hours of operation. The phone should be answered in a timely manner unless the assigned staff are presently assisting another customer

- A. All calls should be answered as follows: "Thank you for calling WorkOne West Central, how may I direct your call?"
- B. The WorkOne Center will receive many calls from customers requesting information and assistance on a wide range of topics. The following table highlights the most frequent phone calls that are expected and a suggested response.

Questions or concerns regarding Unemployment	Refer to the toll free number. 1-(800)-891-6499 or follow current DWD local office UI procedures.
Wanting to speak to a specific Team Member	Call should be transferred to the individual Team Member at the appropriate extension.
Employer inquiring about the Center and our services	Call should be transferred to the specified business service representative at the local REACH center if telephone system allows transfer. If Employer can not be transferred, send to designated Career Team Member.
Customer inquiring about attending training or obtaining Financial Aid for training.	Customer is encouraged to visit the WorkOne Center to complete the Talent Assessment Team process. Customer should be informed of what documentation they should bring when they come (DL and a SS Card or a Birth Certificate).
Unemployment hearing information and Judges	Verify the schedule.
Work Keys Assessment	<ul style="list-style-type: none"> • New customers should be referred to the Talent Assessment Team to complete the talent assessment team process. Customer should be informed of what documentation they should bring when they come (DL and a SS Card or a Birth Certificate). • Returning customers should be referred to the Reach Center • Direct referrals from employees (incumbent workers) who are told by their employer that they need to get a WorkKeys assessment will be directed to the REACH Center

Questions about Resume Assistance	<ul style="list-style-type: none"> • Inform customer of documentations needed to begin assistance • Call should be transferred to an available Career Advancement Team Member.
Questions or requests about Job Leads/Job Fairs	Call should be transferred to any available Career Advancement Team Member.
All other calls such as Major Opportunities, Youth programs, veterans services	Call should be transferred to the appropriate staff person with the expertise to assist the customer

Other Items to address if customer is planning on visiting WorkOne Center:

Children are not allowed in the assessment lab area, therefore please find childcare for them during customer's visit

Address Documentation and list of acceptable documentation – cheat sheet

Address Time allotment

Give the caller the best time to come in according to scheduler

Talent Assessment Team Process – Unemployment Assistance

- A. The customer will be directed to a Talent Assessment Team member with UI knowledge.
- B. A member of the Talent Assessment Team will conduct a brief fact finding interview to determine the reason for filing UI.
- If the customer only has a question about their claim, the Talent Assessment Team member with UI knowledge will assist (if applicable) or advise them on how to proceed (i.e.- contact the Uplink Call Center @ 1-800-891-6499 or access their account in Uplink). Staff will utilize Cadet as needed.
 - If the customer has an existing claim and/or wants to **only** complete a voucher, they will be directed to the customer self service computers.
 - If the customer is filing a new claim they will be routed to the customer computers. (Domestic Violence customers will be handled according to UI procedures to ensure confidentiality is met).
 - If the customer is “job attached” once the claim is filed and it has been determined the customer is not interested in proceeding with any other services they will be advised of the self-service area.
 - Assistance may be provided if the customer chooses to establish an account to check the status of their Debit Card or be given the marketing material to do so at a location of their choice.
- C. Assistance will be provided according to the “Local Office UI Responsibilities”. These responsibilities are to be followed as outlined and all UI staff has been provided a detailed version of these instructions and guidelines. A brief overview of these are as follow:
- File UI into the CSS system
 - Account status in CSS
 - Address changes
 - 1099s (for income tax purposes)
 - Requests for Appeals/ Review Board
 - Online Debit Card Account Access (www.EPPlcard.com)
 - Mail/FedEx

Talent Assessment Team Process – The Re-employment Eligibility Assessment Process

Overview

The Re-employment Eligibility Assessment (REA) activity focuses on identifying customers receiving UI benefits that may be expected to exhaust these benefits without skill development and job search assistance. This activity also has several direct linkages to UI services, since participation for identified customers is mandatory and UI benefits can be jeopardized if participation does not occur. As such, this activity will be managed within the Talent Assessment Team to ensure that these critical UI linkages are maintained. This activity will only occur in the two full service WorkOne Centers.

- The Talent Assessment Team Member will refer the customer to the Career Advancement Team or the Skills Development Team. In addition to the information gathered during the one-on-one interview, this decision should be based on the Team Members' evaluation of the following factors:
- A. **Send Letters to Selected UI Claimants:** Each week, The WorkOne Center will receive a list of names from the state which identifies customers that have been identified as appropriate for participation in REA activities. The REA Talent Assessment Team Member will take the list and send letters to identified UI claimants informing of their required participation in REA activities. In this letter, these customers will be informed of the specific services that they will receive from WorkOne as part of the REA activity as well as the specific date and time that they must attend an information session at the WorkOne Center.
 - B. **REA Information Sessions:** (The following will be determined at a later date.)
 1. Each week, an REA information session will be held at the WorkOne Center. In this session, customers will be given information that is required of the REA program as well as job search advice and direction. Of critical importance, however, these customers will also be highly encouraged to participate in the services offered within the WorkOne Center and these services will be described in some detail.
 2. At the conclusion of the information session, customers will be scheduled for a follow up appointment to begin their individual planning session and to complete the Talent Assessment Team process. These customers will also be informed of what documentation they need to bring when they return for their appointment (Drivers license and a Social Security card or a Birth Certificate).
 3. Individual customers that do not attend this required information session will be sent a second notice of the requirement to attend and will be informed that their UI benefits could be jeopardized if they fail to participate in REA activities. Within this second notice, these customers will be given a specific date and time to attend an REA information session.
 4. If a customer fails to attend the information session for a second time, UI staff will be notified and take appropriate action to place a "hold" on the customer's UI benefits until such time that the customer attends the required session.
 - C. **Develop Individual Plan and Begin Talent Assessment Team Process:** When the REA customer returns for their appointment, the assigned staff person will meet with them and complete the individual planning process.

1. Upon arrival, the Talent Assessment Team member will collect the 10 required demographics. Once this is done, the REA customer will be referred to the assigned staff person for further services.
-
2. The assigned staff person will complete the required REA planning documents and provide a copy of these documents to UI staff as appropriate, ensuring that the customer will continue to receive their UI benefits.
 3. The assigned staff person will have each REA customer participate in the full Talent Assessment Team process in order to access the full range of WorkOne services. If the customer accepts this invitation, the assigned staff person will complete the remainder of the Talent Assessment Team process with the customer following the procedures detailed in this manual.
 4. Individual customers that do not attend this required planning session will be sent a second notice of the requirement to attend and will be informed that their UI benefits could be jeopardized if they fail to participate in required REA activities. Within this second notice, these customers will be given a specific date and time for their second appointment.
 5. If the REA customer fails to attend the second appointment, the assigned staff person will communicate this information with UI staff and a "hold" will be placed on the customer's UI benefits until such time that the customer completes the required REA activities.

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Talent Assessment Team Process – The TAA Process

Overview

When customers arrive at a WorkOne Center with a desire for TAA services, there are specific activities that must occur with these individuals to ensure that they do not lose their eligibility for their TAA/TRA benefits. The Talent Assessment Team must identify these customers and ensure that they are engaged in the appropriate and required activities.

- A. **TAA Customers are Greeted:** The first step in serving a TAA customer is to greet them, collect the 10 required demographics.
- B. **Communication with Team Member:** If the customer indicates that they have been referred to the WorkOne Center as a result of a TAA orientation, the receptionist will provide this information to the Talent Assessment Team Member that is to work with the customer. This will ensure that the Team Member is aware of the desired TAA service and that they can factor this into their decision process as they complete Talent Assessment Team activities with the customer.
- C. **Complete the One-On-One Team Process:** Customers with a desire for TAA services will complete the one-on-one process as described in this manual.
 1. In this process, there are specific questions that must be asked regarding TAA eligibility and waivers that may have been issued at the TAA orientation session the customer attended. Additionally, if the customer has been issued a waiver, there should be information in TrackOne that identifies the type of waiver that has been issued. This data should be checked to confirm the information that is provided.
 2. If the customer has been issued a “marketable” skills waiver, this information would most likely indicate that the customer should be referred to the Career Advancement Team for additional services. However, Initial Skills Indicator Assessment scores and other information should be considered in this decision as well.
 3. If the customer has been issued a waiver for future training activities, this information would most likely indicate that the customer should be referred to the Skills Development Team for additional services. Again, however, Initial Skills Indicator Assessment scores and other information should be considered in this decision as well.
 4. If the customer has not been issued a waiver but is still requesting TAA services, the customer should be referred to the Career Advancement or Skills Development Team as appropriate. However, the fact that the customer is TAA eligible must be communicated with the staff person from these teams who is to work with this customer.
 - a. If the customer is walked back and introduced to the staff person, this TAA information will be shared directly.
 - b. If an appointment is made for the customer to return and visit the staff person, the appointment that is made will include a reference to the fact that this customer is TAA eligible to trigger the staff person to get required TAA activities/waivers initiated.

ADDENDUM 1
Attachment A

19

LISTS OF ACCEPTABLE DOCUMENTS

LIST A	LIST B	LIST C
Documents that Establish Both Identity and Employment Eligibility	Documents that Establish Identity	Documents that Establish Employment Eligibility
OR AND		
1. U.S. Passport (unexpired or expired)	1. Driver's license or ID card issued by a state or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address	1. U.S. Social Security card issued by the Social Security Administration <i>(other than a card stating it is not valid for employment)</i>
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)	2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color and address	2. Certification of Birth Abroad issued by the Department of State <i>(Form FS-545 or Form DS-1350)</i>
3. An unexpired foreign passport with a temporary I-551 stamp	3. School ID card with a photograph	3. Original or certified copy of a birth certificate issued by a state, county, municipal authority or outlying possession of the United States bearing an official seal
4. An unexpired Employment Authorization Document that contains a photograph (Form I-766, I-688, I-688A, I-688B)	4. Voter's registration card	4. Native American tribal document
	5. U.S. Military card or draft record	5. U.S. Citizen ID Card <i>(Form I-197)</i>
5. An unexpired foreign passport with an unexpired Arrival-Departure Record, Form I-94, bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, if that status authorizes the alien to work for the employer	6. Military dependent's ID card	6. ID Card for use of Resident Citizen in the United States <i>(Form I-179)</i>
	7. U.S. Coast Guard Merchant Mariner Card	
	8. Native American tribal document	7. Unexpired employment authorization document issued by DHS <i>(other than those listed under List A)</i>
	9. Driver's license issued by a Canadian government authority	
	For persons under age 18 who are unable to present a document listed above:	
	10. School record or report card	
	11. Clinic, doctor or hospital record	
	12. Day-care or nursery school record	

Illustrations of many of these documents appear in Part 8 of the Handbook for Employers (M-274)

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